


LAST REVISED DATE: 06/23/2014

## General Information

| Task   | Process Information  |
|--|--|
| <b>Cancelling an Express PO (Purchase Order)</b> | <p>Use this tip sheet to cancel an Express Purchase Order under the following circumstances:</p> <ol style="list-style-type: none"> <li>1) The Express Purchase Order was entered by mistake</li> <li>2) The Express Purchase Order is a duplicate</li> <li>3) The Express Purchase Order is required to be canceled by the Purchasing organization.</li> </ol> <p>An Express Purchase Order must be in one the following states in order to be canceled:</p> <p><u>An Express Purchase Order is allowed to be canceled when the PO Status is: 'Approved'</u> (whether Budget Checked or not Budget Checked) and there is no activity, or the PO Status is: '<b>Dispatched</b>' and there is no activity. No activity means the Express PO does not have any receipts or associated vouchers posted against it.</p> <p><u>An Express Purchase Order is NOT allowed to be canceled when the PO Status is: 'Dispatched' or 'Approved' and it has had activity.</u></p> <p>The steps and messages will be different when cancelling an Express PO based on what status the Express PO is in prior to cancelling it. These instructions provide the steps to cancel an Express PO for the most common scenarios. If you need to cancel an Express PO which does not fit the most common scenarios, you should call the Procurement Office or complete a Help Desk ticket for further assistance.</p> |

## GEARS Navigation

|  |  |
|--|--|
| Main Menu> Purchasing > Purchase Orders > Add/Update Express POs – Express Purchase Order page |  |
|--|--|

**1.0 Process**

This document is intended to provide a quick reference to cancelling an Express Purchase Order within GEARS.

| STEP | ACTION   | DETAILS  |
|------|--|--|
| 1.   | Select the "Find an Existing Value" Tab  | <p><b>Express Purchase Order</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p>  |
| 2.   | <p><a href="#">Express Purchase Order</a></p> <p>On the <b>Purchase Order</b> screen, enter PO ID:</p> | <p>Favorites Main Menu &gt; Purchasing &gt; Purchase Orders &gt; Add/Update Express POs</p> <p><b>Express Purchase Order</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Search Criteria</p> <p>Business Unit: = MDJUD</p> <p>PO ID: begins with <span style="border: 1px solid red; border-radius: 50%; padding: 2px;"> </span></p> <p>Purchase Order Date: =</p> <p>PO Status: =</p> <p>Short Vendor Name: begins with</p> <p>Vendor ID: begins with</p> <p>Vendor Name: begins with</p> <p>Buyer: begins with</p> <p>Buyer Name: begins with</p> <p>PO Type: =</p> <p>Purchase Order Reference: begins with</p> <p>Hold From Further Processing <input type="checkbox"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p> |
| 3.   | Click the <b>Search</b> button.  |  |

4.

To cancel this purchase order, click the **Cancel PO** icon (red X).

The screenshot shows the Oracle Express Purchase Order form. The PO Status is 'Dispatched' and the Budget Status is 'Valid'. A red 'X' icon is circled in red, and a callout box points to it with the text 'Cancel PO icon, Red X'. The form includes fields for Business Unit, PO ID, Vendor, and various status indicators. A table at the bottom shows the PO line details.

| Line | Description          | PO Qty | UOM | Category     | Merchandise Amt | Status   |
|------|----------------------|--------|-----|--------------|-----------------|----------|
| 1    | ORDER #021-1 RED INK | 6.0000 | EA  | OFFICE_SUPPL | 525.24          | Approved |

5.

A message will be displayed explaining that cancelling a purchase order will prevent any further changes, and asking if you would like to continue.

Click the **Yes** button.

The screenshot shows a message dialog box with the text: 'Canceling a purchase order will commit any changes made and prevent further changes. Continue? (10200,515)'. Below the text, there are 'Yes' and 'No' buttons. The 'Yes' button is circled in red.

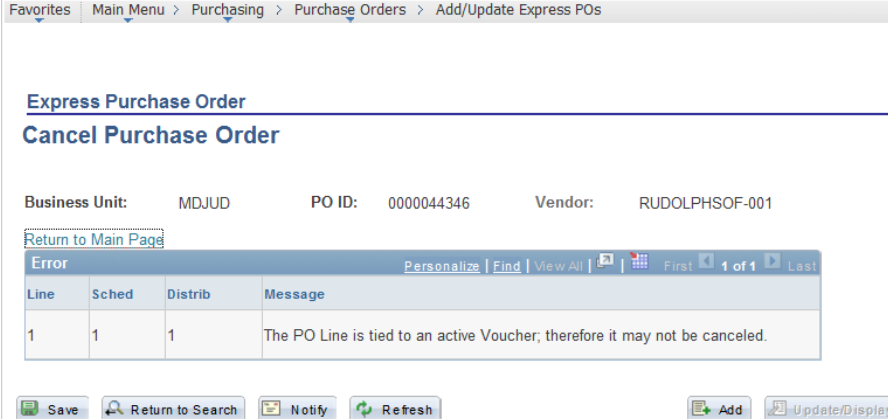
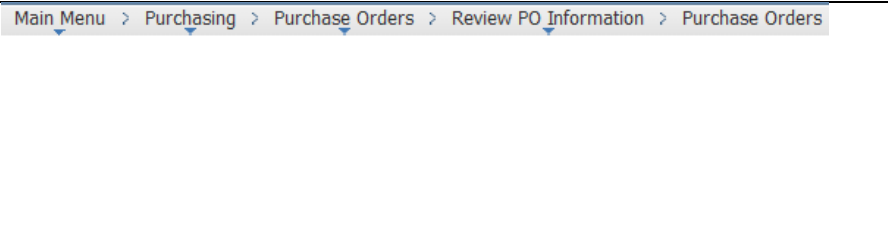
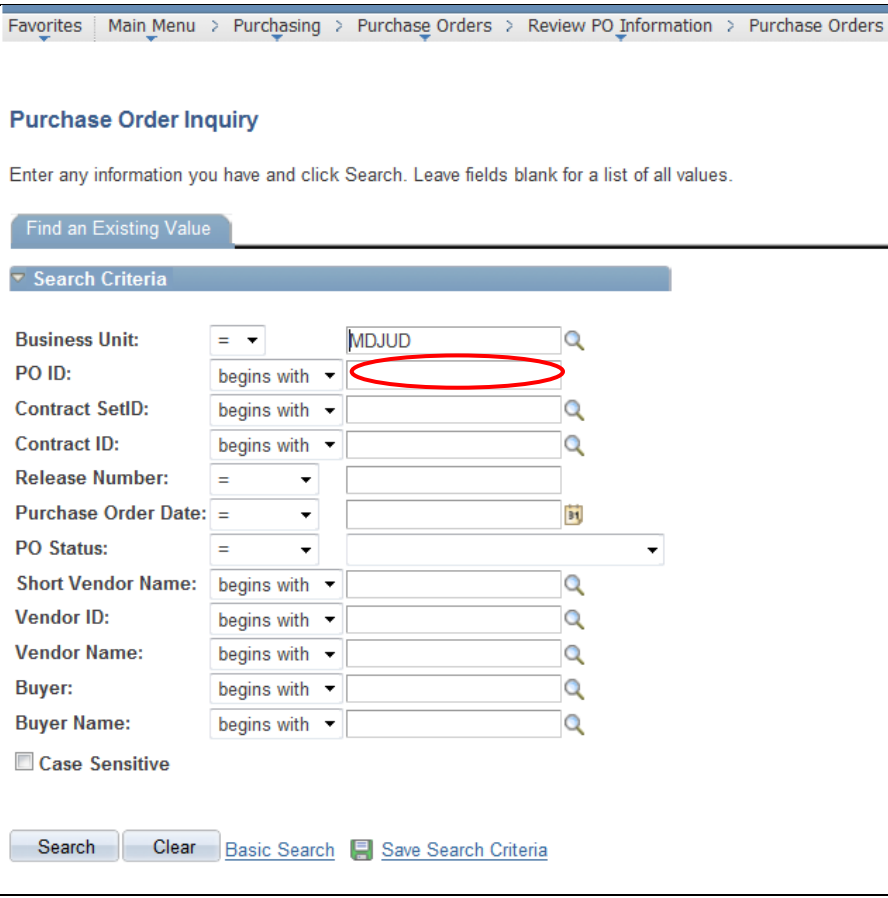
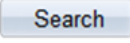
6.

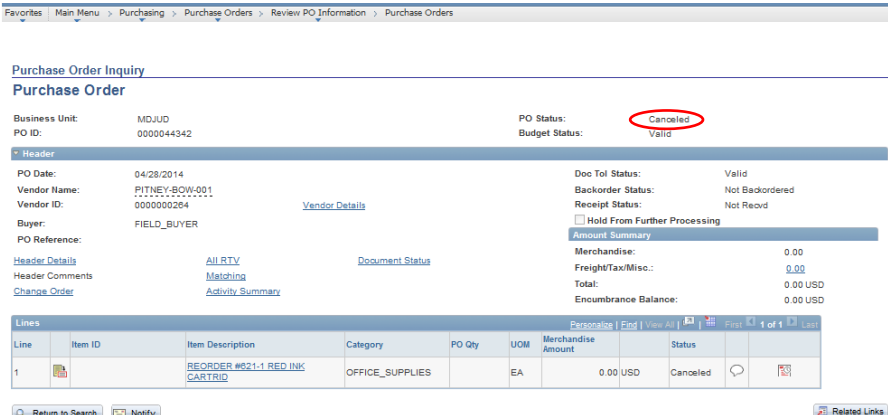
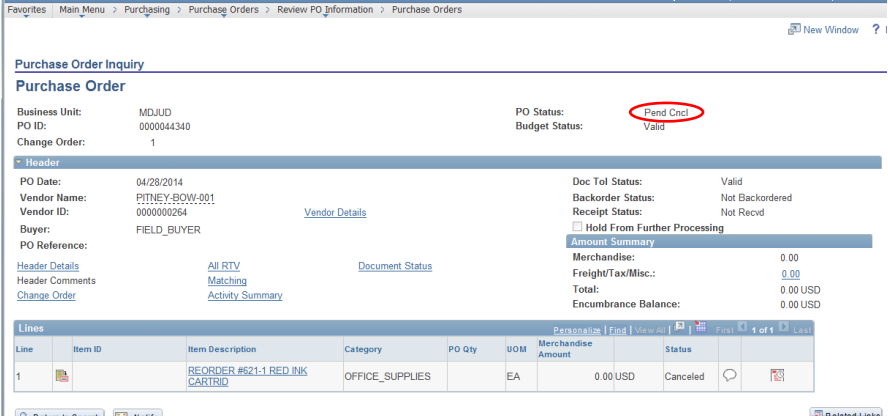
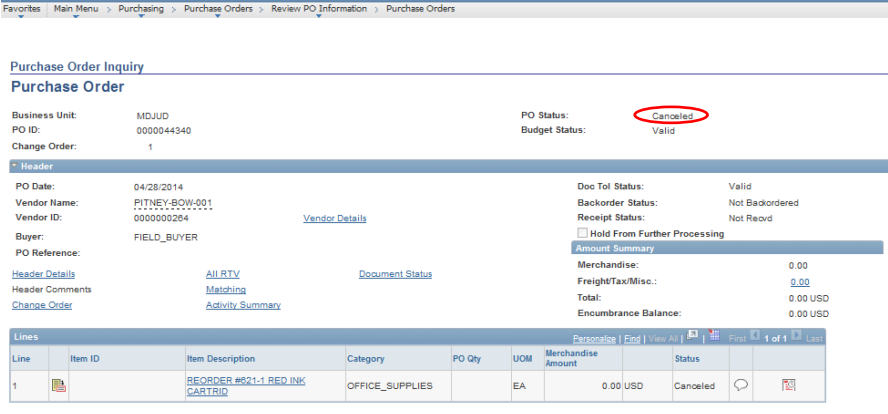
If your Express PO had a PO Status of **'Approved'** but had NOT been budget checked or dispatched, then a message will be displayed explaining that the "The PO cancellation was successful".

Click the **OK** Button.

The screenshot shows the Oracle Express Purchase Order form with the title 'Cancel Purchase Order'. The message states: 'The purchase order cancellation was successful.' Below the message, there is an 'OK' button circled in red. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

| <div>7.</div> | <div><p>If your Express PO had a PO Status of <u>'Approved'</u> and had been budget checked, but had NOT been dispatched, then a message will be displayed explaining that the "The PO has been canceled, but requires a budget check."</p><p>Click the <b>Budget Check</b> Button.</p></div>               | <div><div><div><div>FavoritesMain MenuPurchasingPurchase OrdersAdd/Update Express POs</div><div>Express Purchase Order</div><div>Cancel Purchase Order</div><div>The PO has been canceled, but requires a budget check. Press the Budget Check button below to run the budget checking process. Otherwise, click OK to continue without budget checking the PO.</div><div><div>Budget Check</div><div>Ok</div></div><div>Goto: <a href="#">View Budget Status- Prorated</a> <a href="#">Budget Status- Non Prorated</a></div><div><div>SaveReturn to SearchNotifyRefresh</div><div>AddUpdate/Display</div></div></div></div></div>   |  |       |         |         |   |   |   |  |
|---------------|---|--|--|-------|---------|---------|---|---|---|--|
| <div>8.</div> | <div><p>If your Express PO had a PO Status of <u>'Dispatched'</u> but had NOT been received or vouchered, then a message will be displayed explaining that the "PO has 'Pending Cancel' status, but requires a budget check."</p><p>Click the <b>Budget Check</b> Button.</p></div>                         | <div><div><div><div>ORACLEHomeWorklist</div><div>FavoritesMain MenuPurchasingPurchase OrdersAdd/Update Express POs</div><div>Express Purchase Order</div><div>Cancel Purchase Order</div><div>PO has 'Pending Cancel' status, but requires a budget check. Press the Budget Check button below to run the budget checking process. Otherwise, click OK to continue without budget checking the PO. Also, PO has 'Pending Cancel' status. Dispatch PO to set the status to 'Canceled'.</div><div><div>Budget Check</div><div>Ok</div></div><div>Goto: <a href="#">View Budget Status- Prorated</a> <a href="#">Budget Status- Non Prorated</a></div><div><div>SaveReturn to SearchNotifyRefresh</div><div>AddUpdate/Display</div></div></div></div></div> |  |       |         |         |   |   |   |  |
| <div>9.</div> | <div><p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been partially or fully received, then a message will be displayed explaining that the "Line has been received, you may not cancel /line/schedule/distribution."</p><p><b>NOTE:</b> This Express PO cannot be canceled.</p></div> | <div><div><div><div>FavoritesMain MenuPurchasingPurchase OrdersAdd/Update Express POs</div><div>Express Purchase Order</div><div>Cancel Purchase Order</div><div>Business Unit: MDJUD PO ID: 0000044343 Vendor: PITNEY-BOW-001</div><div><a href="#">Return to Main Page</a></div><div><div>Error</div><div>PersonalizeFindView AllFirst1 of 1Last</div><table><tr><th>Line</th><th>Sched</th><th>Distrib</th><th>Message</th></tr><tr><td>1</td><td>1</td><td>1</td><td>Line has been received, you may not cancel line/schedule/distribution.</td></tr></table></div><div><div>SaveReturn to SearchNotifyRefresh</div><div>AddUpdate/Display</div></div></div></div></div>   | Line   | Sched | Distrib | Message | 1 | 1 | 1 | Line has been received, you may not cancel line/schedule/distribution. |
| Line          | Sched   | Distrib  | Message  |       |         |         |   |   |   |  |
| 1             | 1   | 1  | Line has been received, you may not cancel line/schedule/distribution. |       |         |         |   |   |   |  |

|     |  |   |
|-----|--|---|
| 10. | <p>If your Express PO had a PO Status of <u>'Dispatched'</u> and had been tied to an <u>active Voucher</u>, then a message will be displayed explaining that the "The PO Line is tied to an active Voucher, therefore it may not be canceled."</p> <p><b>NOTE:</b> This Express PO cannot be canceled.</p> |   |
| 11. | <p>To view your Express Purchase Order after you cancel it go to: Main Menu&gt; Purchasing &gt; Purchase Orders &gt; Review PO Information &gt; Purchase Orders - Purchase Order Inquiry page</p>  |   |
| 12. | <p>On the <b>Purchase Order Inquiry</b> screen, enter PO ID:</p>   |  |
| 13. | <p>Click the  button.</p>   |   |

|                   |   |  |
|-------------------|---|--|
| <p><b>14.</b></p> | <p>If your Express PO had a PO Status of <b>'Approved'</b>, your Express Purchase Order will now have a <b>'Canceled'</b> PO Status.</p>  |  <p>The screenshot shows the 'Purchase Order Inquiry' screen for PO ID 000044342. The PO Status is 'Canceled' (highlighted with a red circle). The Budget Status is 'Valid'. The PO Date is 04/28/2014. The Vendor Name is PITNEY-BOW-001. The Buyer is FIELD_BUYER. The PO Reference is FIELD_BUYER. The Amount Summary shows Merchandise: 0.00, Freight/Tax/Misc.: 0.00, Total: 0.00 USD, and Encumbrance Balance: 0.00 USD. The Lines table shows one line item: REORDER #521-1 RED INK CARTRID, OFFICE_SUPPLIES, EA, 0.00 USD, Canceled.</p>   |
| <p><b>15.</b></p> | <p>If your Express Purchase Order had a PO Status of <b>'Dispatched'</b>, your Express Purchase Order will now have a <b>'Pend Cncl'</b> (Pending Cancel) PO Status until it has been dispatched by the Purchasing Department.</p> <p><b>NOTE:</b> The Purchasing Department will need to be notified when your Express Purchase Order is 'Pend Cncl' (Pending Cancel), so they can dispatch your Express Purchase Order to the vendor informing them that your Express Purchase Order is canceled.</p> |  <p>The screenshot shows the 'Purchase Order Inquiry' screen for PO ID 000044340. The PO Status is 'Pend Cncl' (highlighted with a red circle). The Budget Status is 'Valid'. The PO Date is 04/28/2014. The Vendor Name is PITNEY-BOW-001. The Buyer is FIELD_BUYER. The PO Reference is FIELD_BUYER. The Amount Summary shows Merchandise: 0.00, Freight/Tax/Misc.: 0.00, Total: 0.00 USD, and Encumbrance Balance: 0.00 USD. The Lines table shows one line item: REORDER #521-1 RED INK CARTRID, OFFICE_SUPPLIES, EA, 0.00 USD, Canceled.</p> |
| <p><b>16.</b></p> | <p>After your <b>'Pend Cncl'</b> (Pending Cancel) Express Purchase Order has been dispatched by the Purchasing Department, your Express Purchase Order will have a <b>'Canceled'</b> PO Status.</p>   |  <p>The screenshot shows the 'Purchase Order Inquiry' screen for PO ID 000044340. The PO Status is 'Canceled' (highlighted with a red circle). The Budget Status is 'Valid'. The PO Date is 04/28/2014. The Vendor Name is PITNEY-BOW-001. The Buyer is FIELD_BUYER. The PO Reference is FIELD_BUYER. The Amount Summary shows Merchandise: 0.00, Freight/Tax/Misc.: 0.00, Total: 0.00 USD, and Encumbrance Balance: 0.00 USD. The Lines table shows one line item: REORDER #521-1 RED INK CARTRID, OFFICE_SUPPLIES, EA, 0.00 USD, Canceled.</p> |



**Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.